CAIT User Manual

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Introduction to CAIT, including main changes

The Course Approvals and Information Tool (CAIT) has been developed to replace the original LUSI online course approvals system, with effect from 2012/13.

CAIT is an online tool which allows users to record proposed new courses (schemes and modules) - and revisions – and also enables updates to be made to other course information held in LUSI. Given the increasing role of LUSI in hosting data which feeds into online course information for prospective students and others, it is vital that departments endeavour to review course information at least annually – therefore, CAIT is also a means to conduct those checks and submit changes where necessary.

The main changes hosted within CAIT include:

- User libraries of current draft and submitted proposals
- Proposed revisions to courses are now to be submitted online using CAIT:
    - The existing LUSI record for a course module (CMOD) or scheme of study (SoS) is selected and retrieved for amendment and the user records details of the proposed revisions at the top of the form.
    - Live LUSI fields can also be checked and edited if the information is out of date/ requires minor tweaks. This can be conducted either when revisions are being proposed or as part of a department's annual or periodic review of course information.
    - CAIT also provides users with the opportunity to reformat how course text appears online. For example, when bulleted lists were not available via the old course approvals service, then dashes, asterisks or other punctuation marks may have been used. We encourage users to take the opportunity to tidy up any messy formatting in course data when submitting a revised proposal.
- Submissions for new courses or revisions will generate email alerts to Faculty TQSO and others. The Faculty TQSO plays a triage role, especially with regard to revisions, and will contact the user to confirm next steps. The final approval of all courses/ revisions will be recorded using CAIT and an email alert of that approval is then sent to the originating user.
- A fuller guidance library has been developed online, to complement the onscreen instructions per field. All instructions and guidance can be edited quickly, as required, and this will be undertaken by the Academic Standards & Quality (ASQ) team in the Secretariat.

To confirm, a number of modifications to CAIT are expected to be considered for Phase II development during 2013, including changes in relation to other LUSI projects and greater integration with other services (e.g. Library reading list management systems). More information will be provided to users – and views sought – when the scope of the Phase II project is being defined.

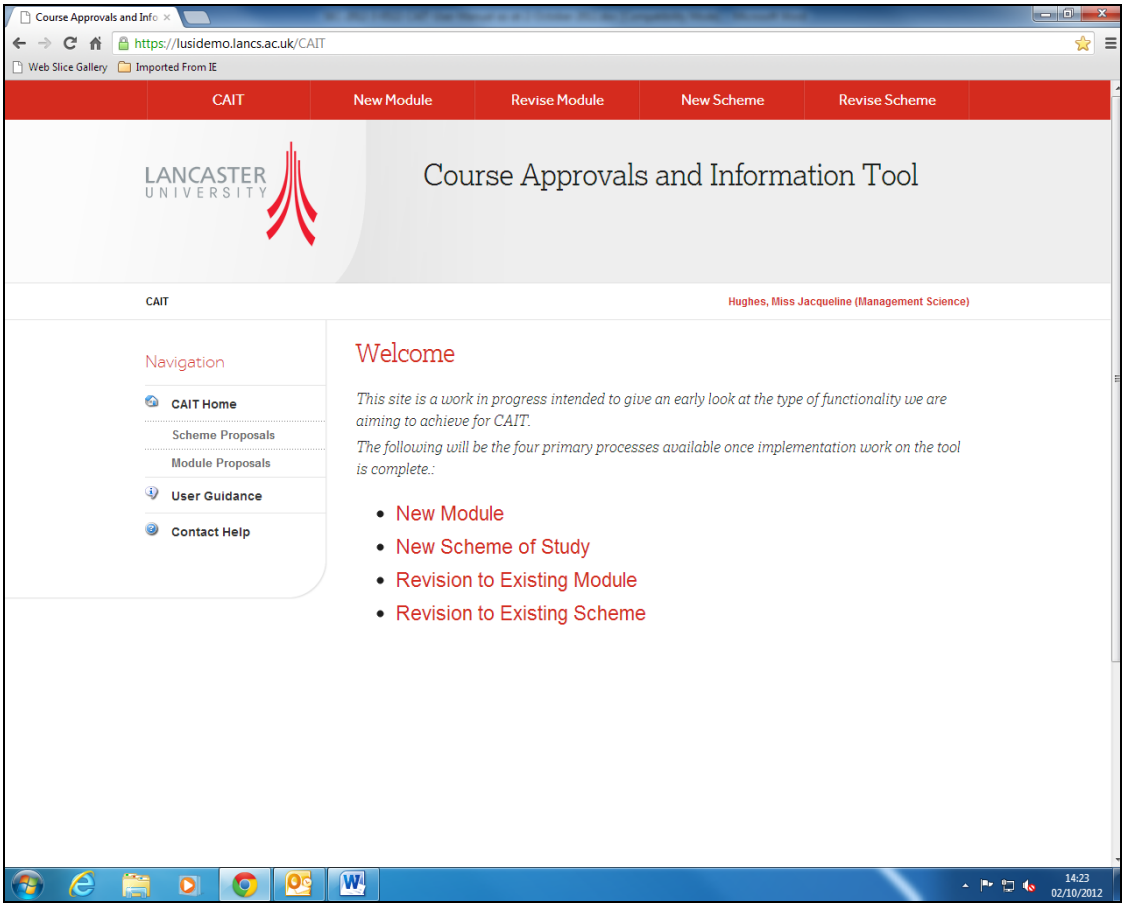
October 2012

How to…

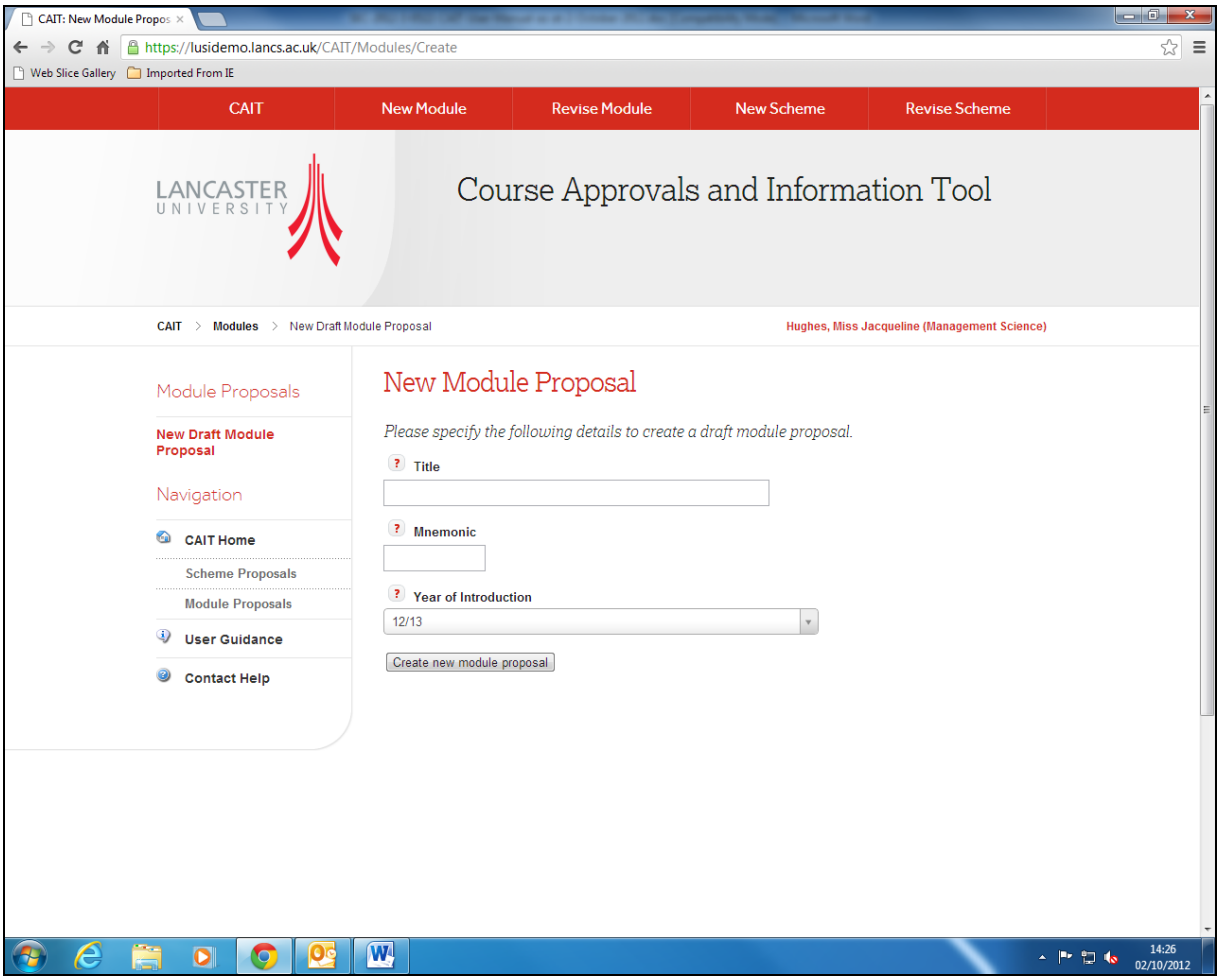
Create a new course proposal

New Course Module (CMOD)

From the opening page of CAIT…



…select 'New Module'. You now enter a page like this…



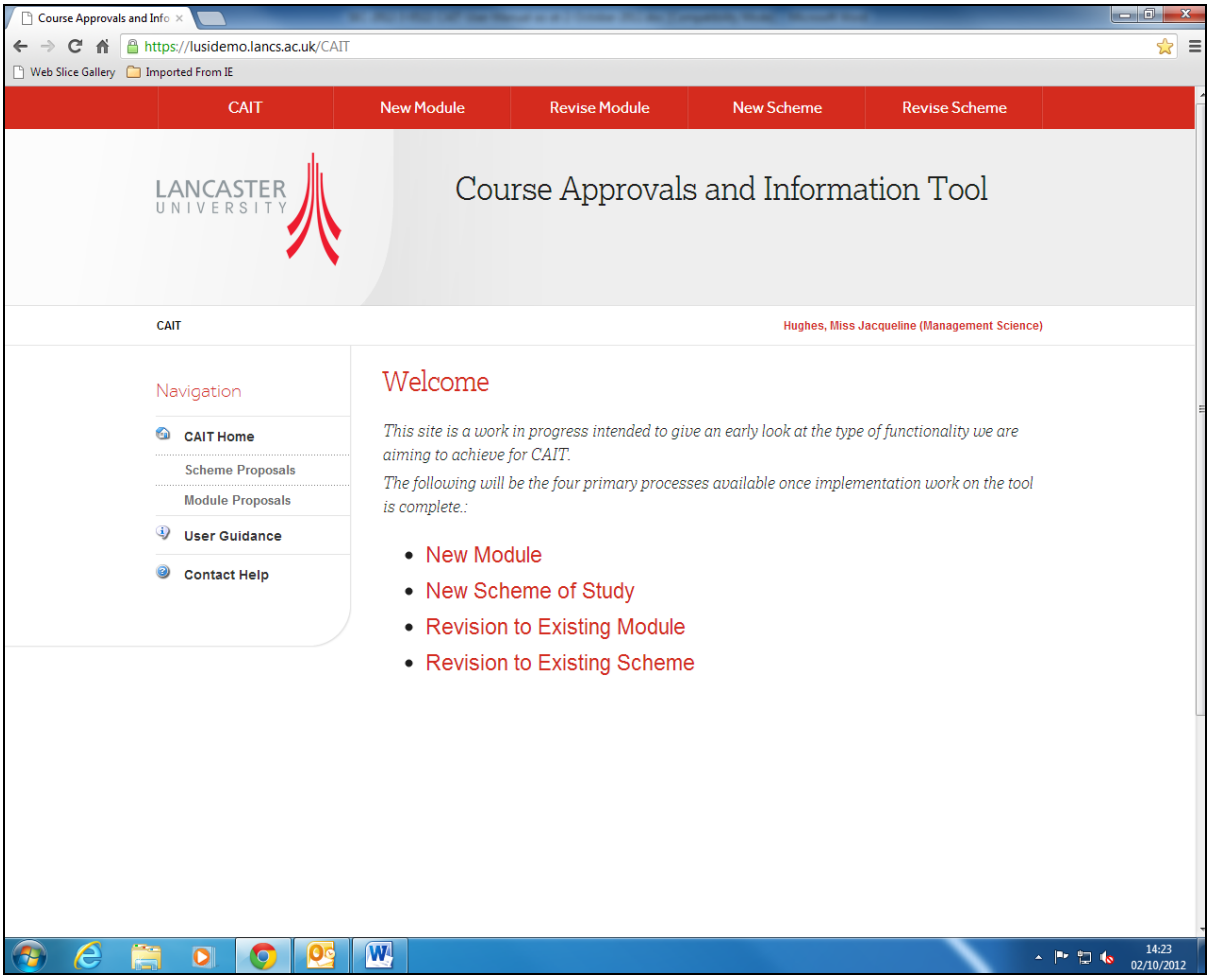
Here, you will enter *title*, *mnemonic* and *date of introduction* information. For information on how to complete any field, you can click the small ? icon to open a box of onscreen instructions. Where further guidance might be needed, you can also click through to open a new window which links to the particular term within the online Guidance Library.

When you have completed the three fields, click to **'create new module proposal'.**

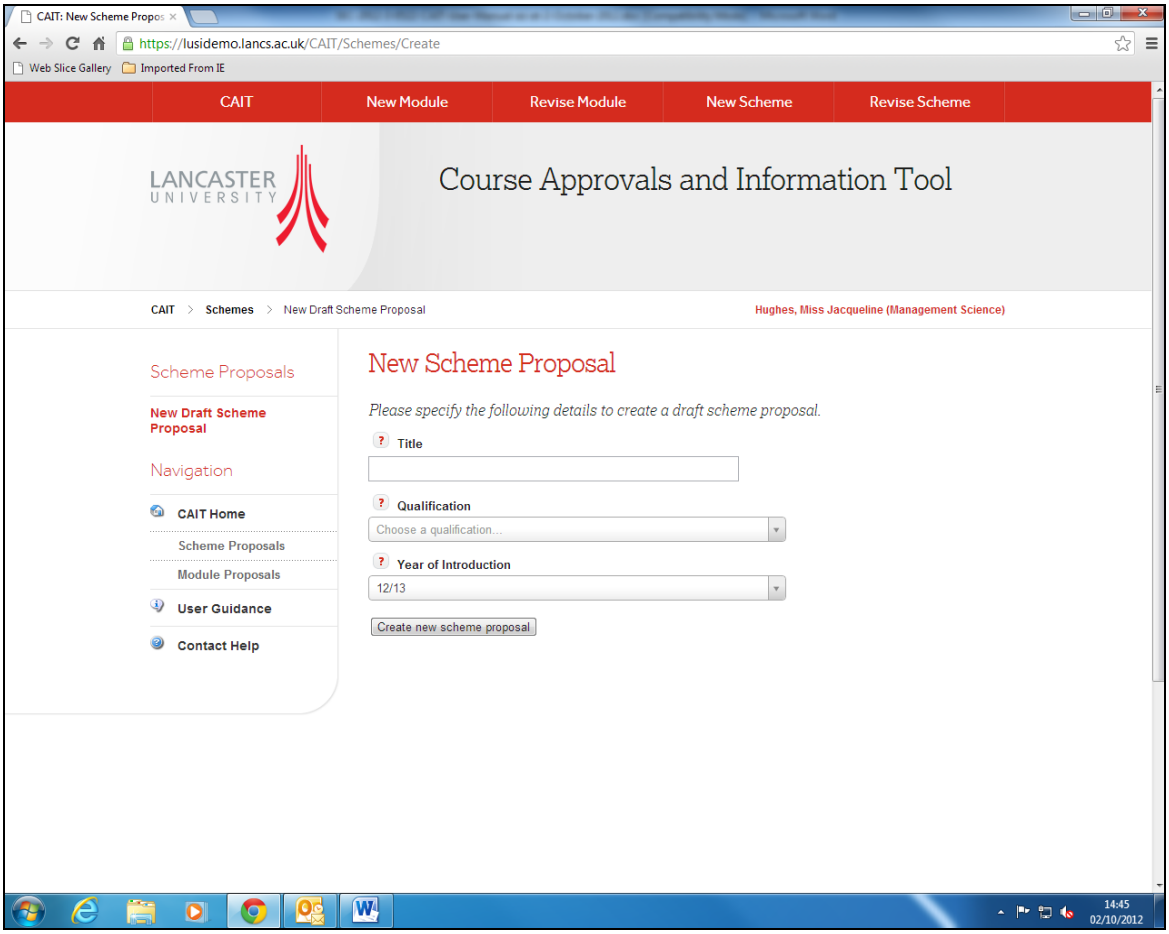
You have now created your draft proposal and enter the first page of the proposal form. You may now proceed to complete the New Course Module (CMOD) form.

New Scheme of Study (SoS)

From the opening page of CAIT…



…select 'New Scheme of Study'. You now enter a page like this…



Here, you will enter *title*, *qualification* and *date of introduction* information. For information on how to complete any field, you can click the small ? icon to open a box of onscreen instructions. Where further guidance might be needed, you can also click through to open a new window which links to the particular term within the online Guidance Library.

When you have completed the three fields, click to **'create new scheme proposal'.**

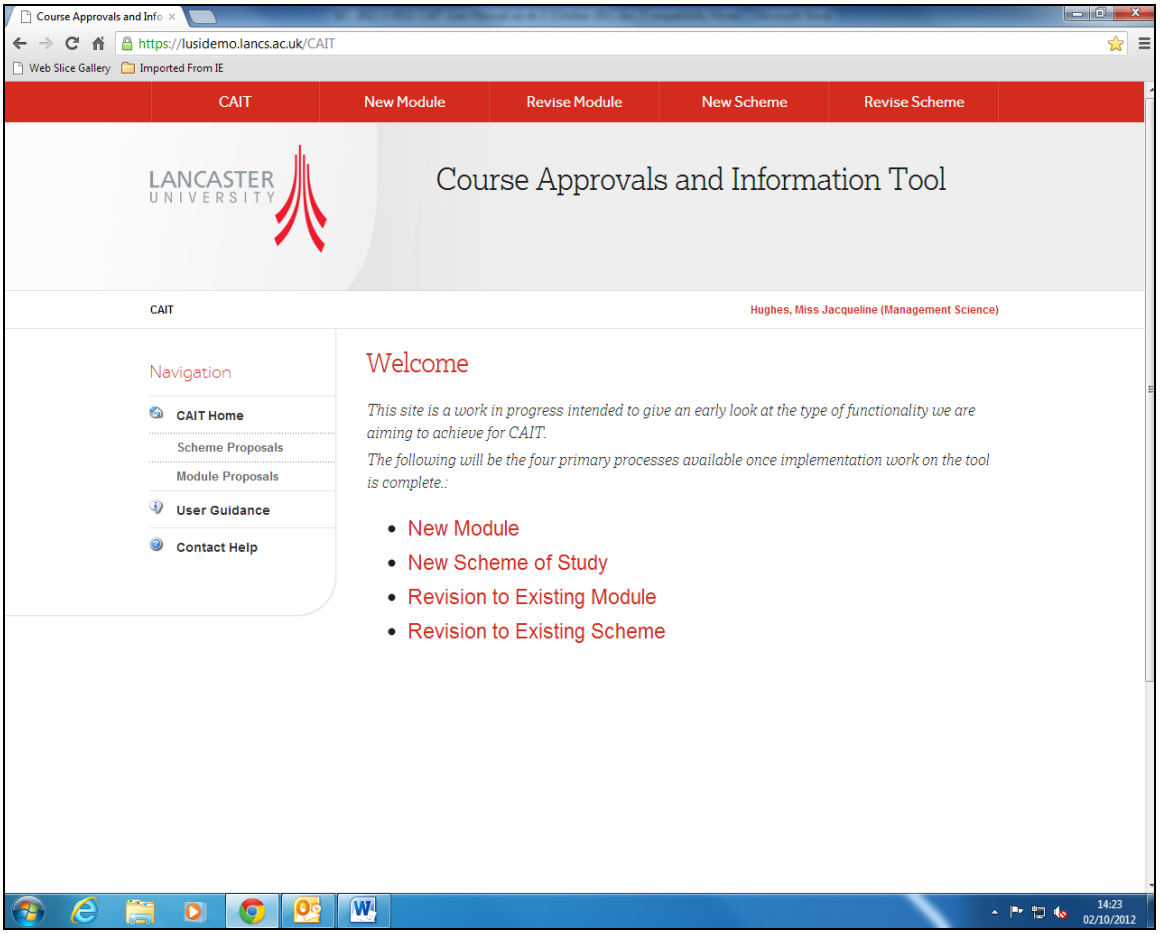
You have now created your draft proposal and enter the first page of the proposal form. You may now proceed to complete the New Scheme of Study (SoS) form.

Retrieve an existing course record for update

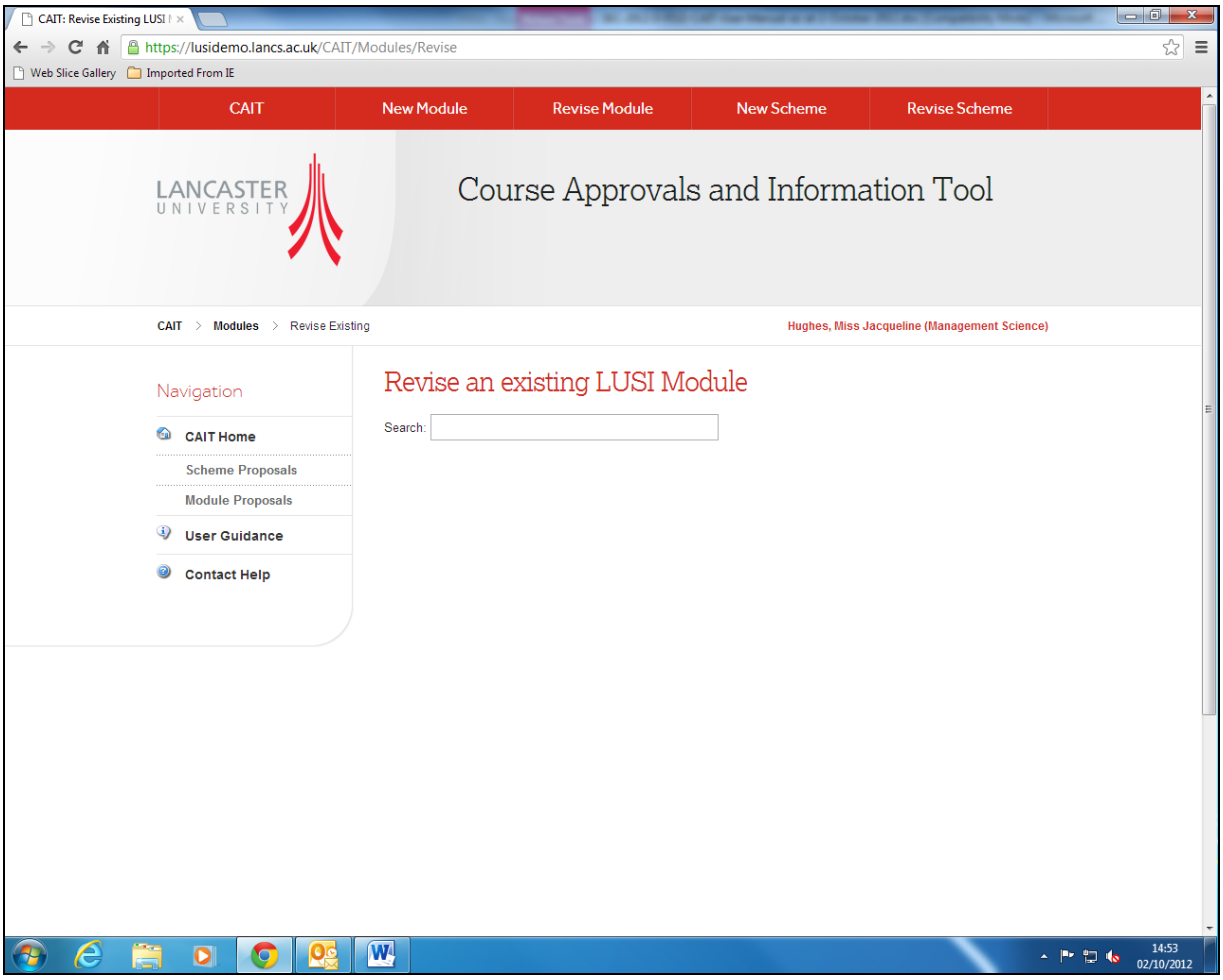
Revisions to an existing Course Module (CMOD)

ⓘ Revisions to existing courses are different from the forms for new courses as CAIT will retrieve the existing course information from LUSI and pull this through for revision. Based on the year of revision that you identify (see below), changes will only be applied to LUSI from that year forward.

From the opening page of CAIT…



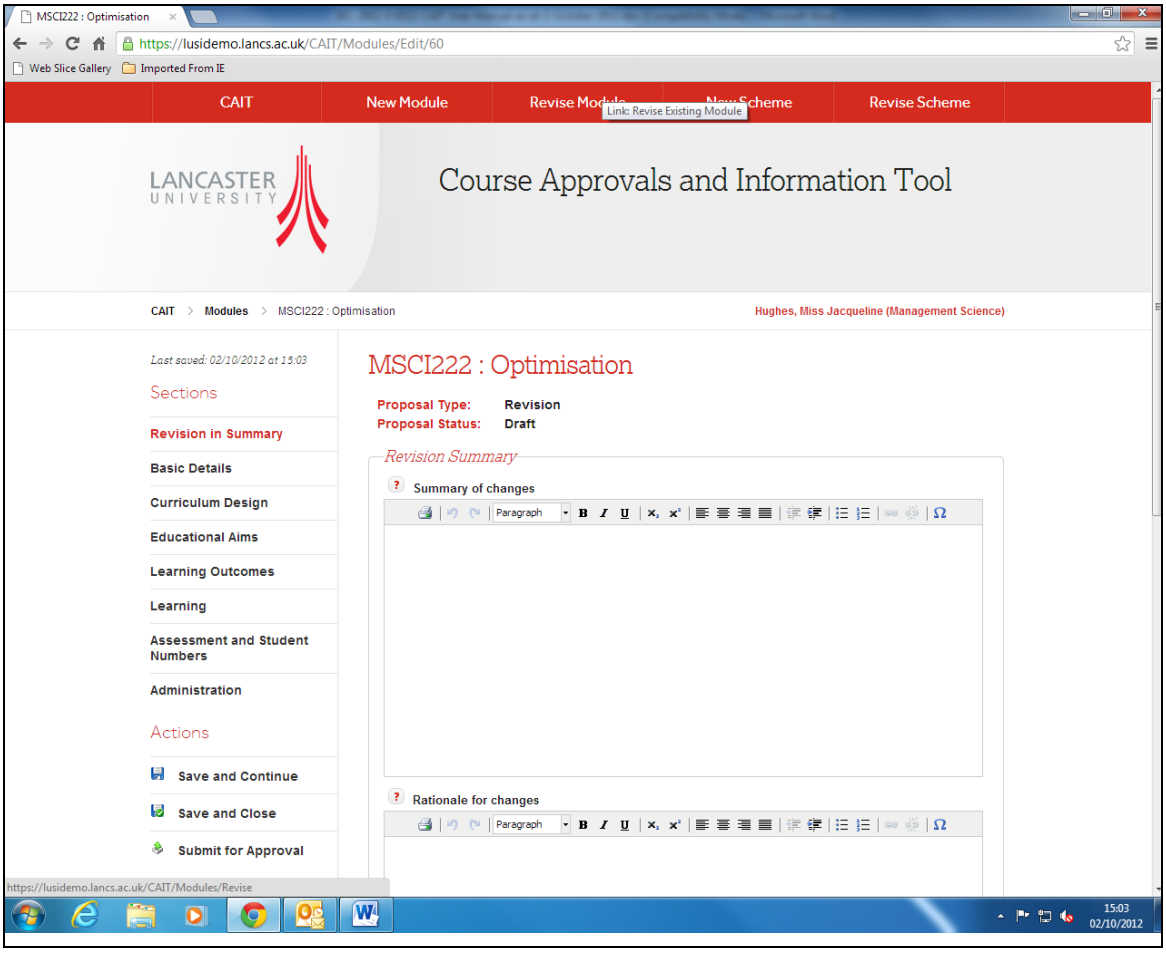
…select 'Revision to Existing Module'. You now enter a page like this…



Here, you will search for the module to be revised either by typing in the mnemonic for the module (e.g. “hist411”) or by typing in part of its title (e.g. “advanced social history”).

You will then select the correct module details and the correct year from when the changes will take effect – simply by clicking on the correct record which appears.

You have now created your draft proposal and will enter the first page of the proposal form. The first page of the module revision form looks like this…



…and includes three fields which you must complete in full to provide:

- A summary of the changes being proposed.
- The rationale for proposing these changes
- Details of any resource requirements or implications (library, special equipment, space and staffing) specific to this revision.

For information on how to complete these or any other fields in CAIT, you can click the small ? icon to open a box of onscreen instructions. Where further guidance might be needed, you can also click through to open a new window which links to the particular term within the online Guidance Library.

When you have completed the three fields, click **'save and continue'** to proceed through the rest of the CAIT proposal form. (You can also select 'save and close' if you prefer to return to the proposal at any other point during completion.)

For the remainder of the revision form:

- The information you will see has been drawn from the LUSI course record for the selected year.
- The onscreen instructions (accessed using ?) will provide information to help you revise the LUSI data or review this for accuracy.
- If you find that any other data viewed in CAIT is incomplete or out of date, please update whatever information you can. This is in the interests of keeping all LUSI course data as up-to-date as possible.

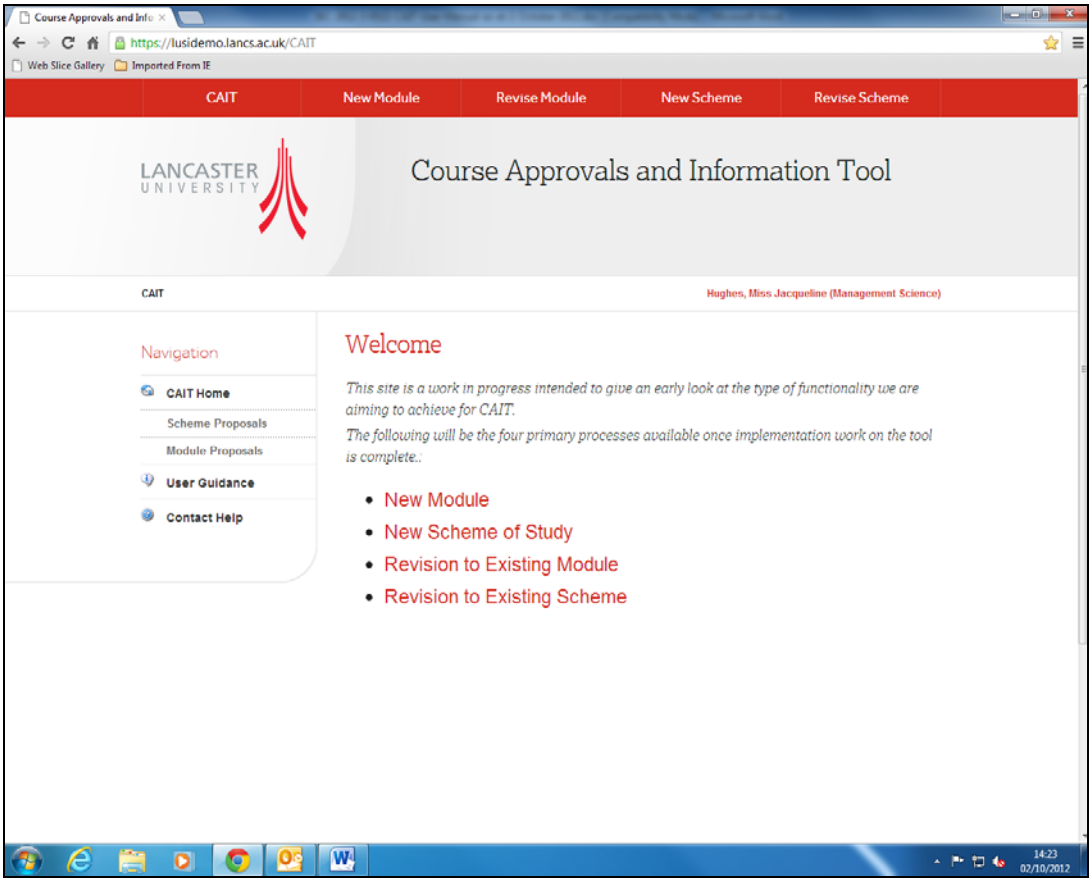
Finally…

With regard to **contact hours for any existing module,** you will summarise the proposed changes in CAIT, but any approved changes which affect contact hours must be recorded separately in LUSI by the Faculty TQSO after approval. This is because the contact hours data is recorded by cohort and not linked directly to CMOD. Therefore, this extra step is necessary for those type of changes.

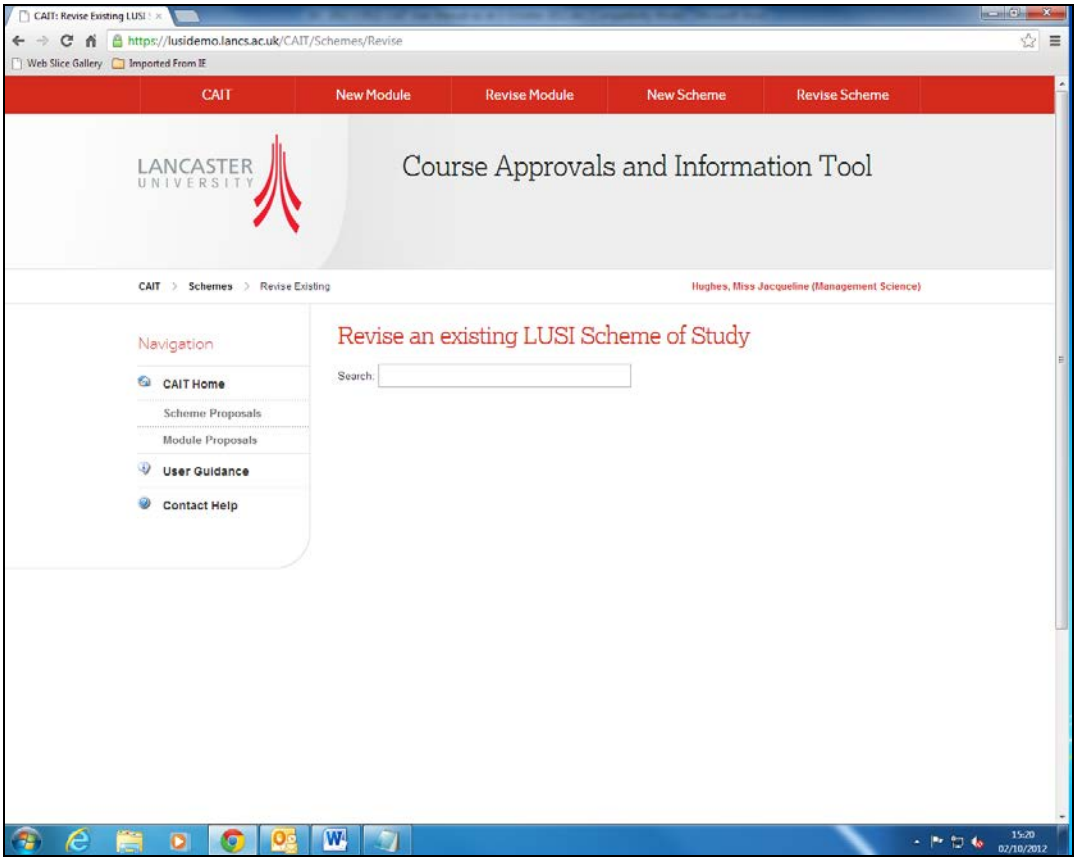
Revisions to an existing Scheme of Study (SoS)

ⓘ Revisions to existing courses are different from the forms for new courses as CAIT will retrieve the existing course information from LUSI and pull this through for amending. Based on the year of revision that you identify (see below), changes will only be applied to LUSI from that year forward.

From the opening page of CAIT…



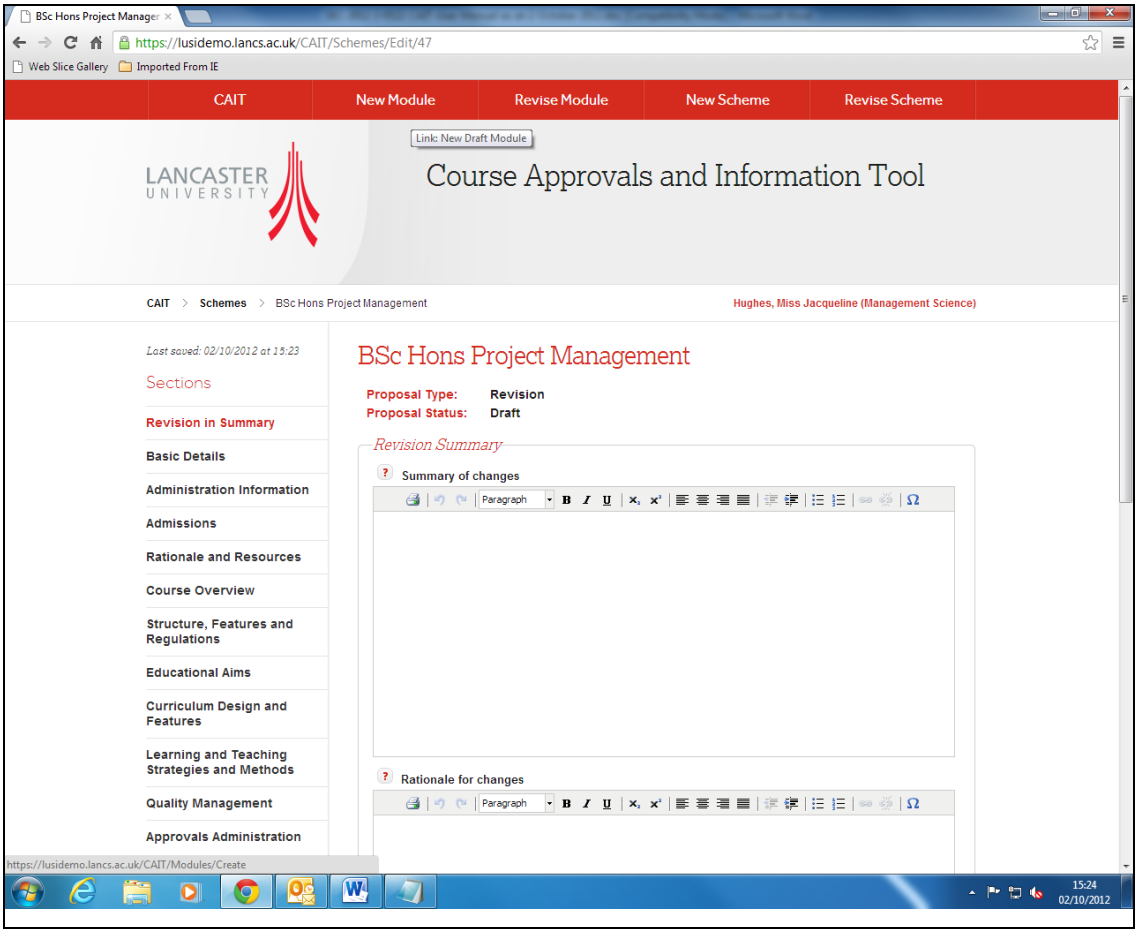
…select 'Revision to Existing Scheme'. You now enter a page like this…



Here, you will search for the scheme to be revised by typing in all or part of its title (e.g. “project management”).

You will then select the correct scheme details and the correct year from when the changes will take effect (e.g. 2014/15) – simply by clicking on the correct record which appears.

You have now created your draft proposal and will enter the first page of the proposal form. The first page of the scheme revision form looks like this…



…and includes three fields which you must complete in full to provide:

- A summary of the changes being proposed.
- The rationale for proposing these changes
- Details of any resource requirements or implications (library, special equipment, space and staffing) specific to this revision.

For information on how to complete these or any other fields in CAIT, you can click the small ? icon to open a box of onscreen instructions. Where further guidance might be needed, you can also click through to open a new window which links to the particular term within the online Guidance Library.

When you have completed the three fields, click **'save and continue'** to proceed through the rest of the CAIT proposal form. (You can also select 'save and close' if you prefer to return to the proposal at any other point during completion.)

For the remainder of the revision form:

- The information you will see has been drawn from the LUSI course record for the selected year:
- The onscreen instructions (accessed using ?) will provide information to help you revise the LUSI data or review this for accuracy.
- If you find that any other data viewed in CAIT is incomplete or out of date, please update whatever information you can. This is in the interests of keeping all LUSI course data as up-to-date as possible.

View and/or edit a draft proposal (or submitted/ approved proposals)

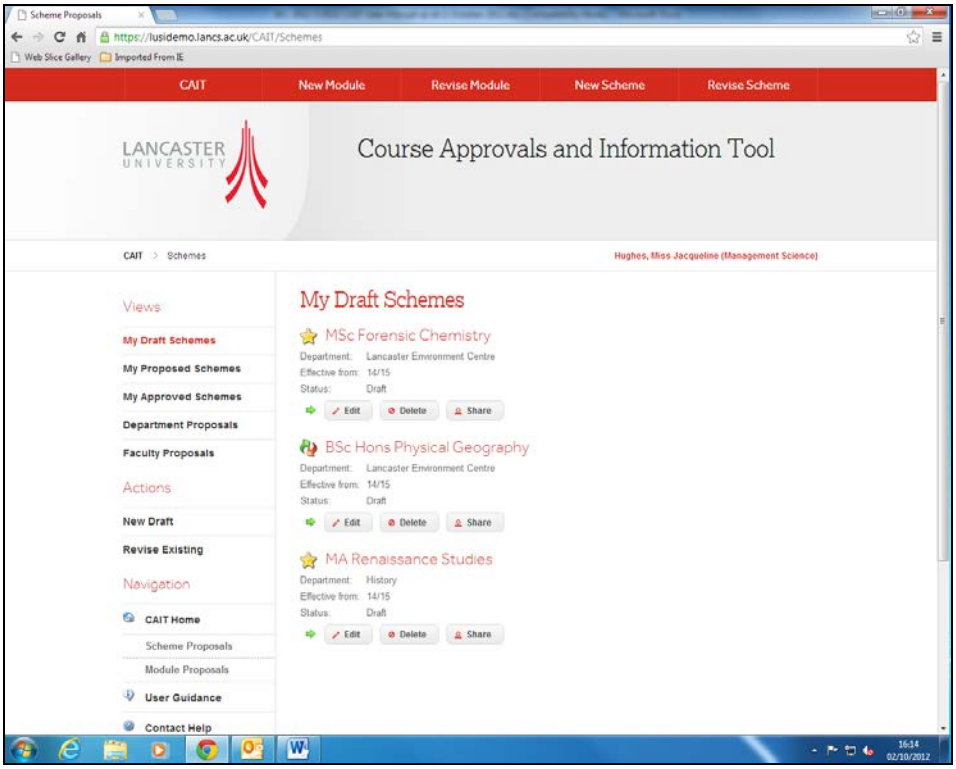
In CAIT, you can search for existing draft proposals produced by yourself or by others in your department or faculty.

You can also identify other users to 'share' a draft proposal with, so that they can also edit draft forms. This section tells you more about that process.

Search for existing drafts

On the top page of CAIT, the left hand menu takes you to either Scheme Proposals or Module Proposals

Upon selection, you enter the following screen…



Your own draft schemes (or modules) are visible in the central pane. From here, you can select 'edit' or 'delete' per draft. (Note: when a draft has been deleted, it can no longer be retrieved, so exercise caution…!)

Your draft schemes include all new or revised course proposals:

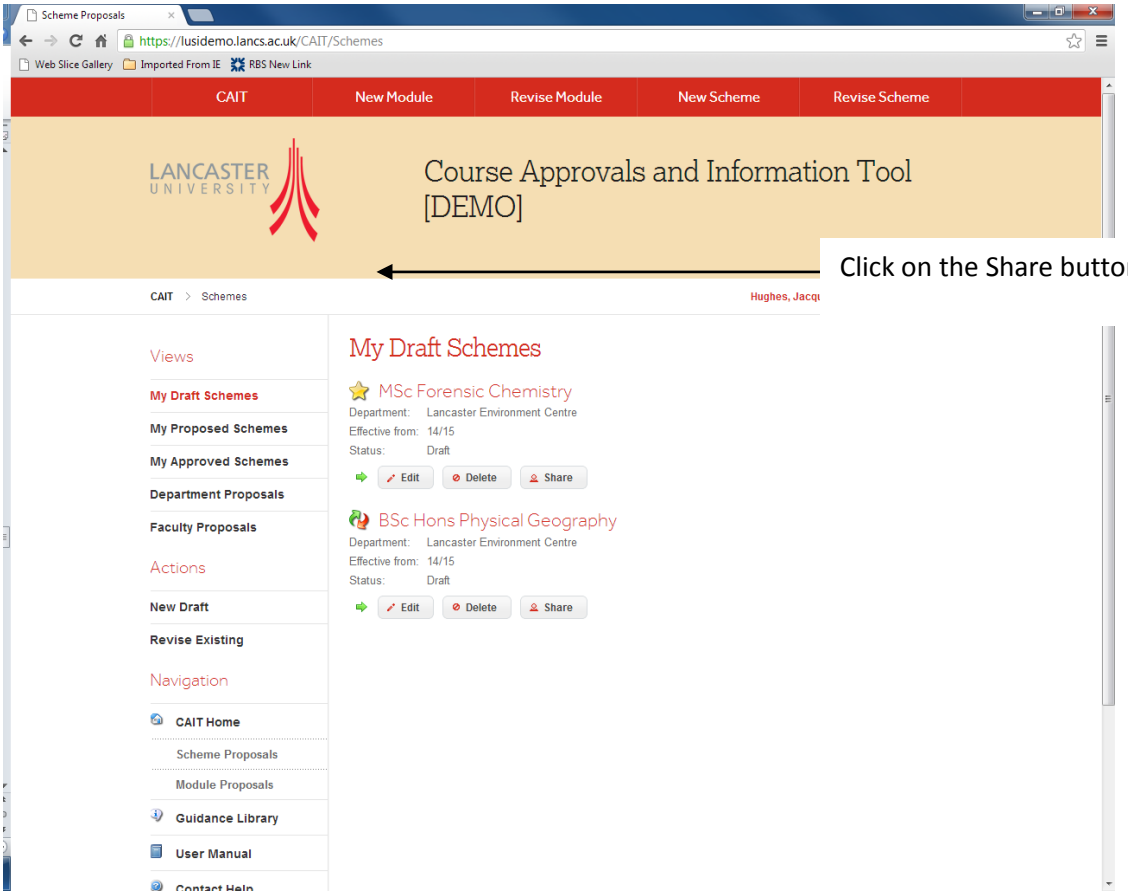
- Proposals for new modules/ schemes are indicated by the star icon.
- Proposed revisions to existing modules/ schemes are indicated by the double-arrow icon.

Using the left hand menu, you can also access:

- My proposed schemes – to view those already submitted for approval
- My approved schemes – to view proposals which have been approved and which will be uploaded to LUSI
- Department Proposals – including your own and other proposals submitted by others in your home department
- Faculty Proposals – including your own and other proposals submitted by others in your home faculty

Sharing drafts with other users

Within your own draft schemes (or modules) you are able to 'share' the draft with other LU users, including any user who is not based in your department or faculty.



To do this:

- Select 'share' for the particular draft proposal (option in the main central pane, see screenshot above).
- You are prompted to select the user by typing in all or part of that person's name.
- Click 'add' per user to be included
- Click 'close' when done.

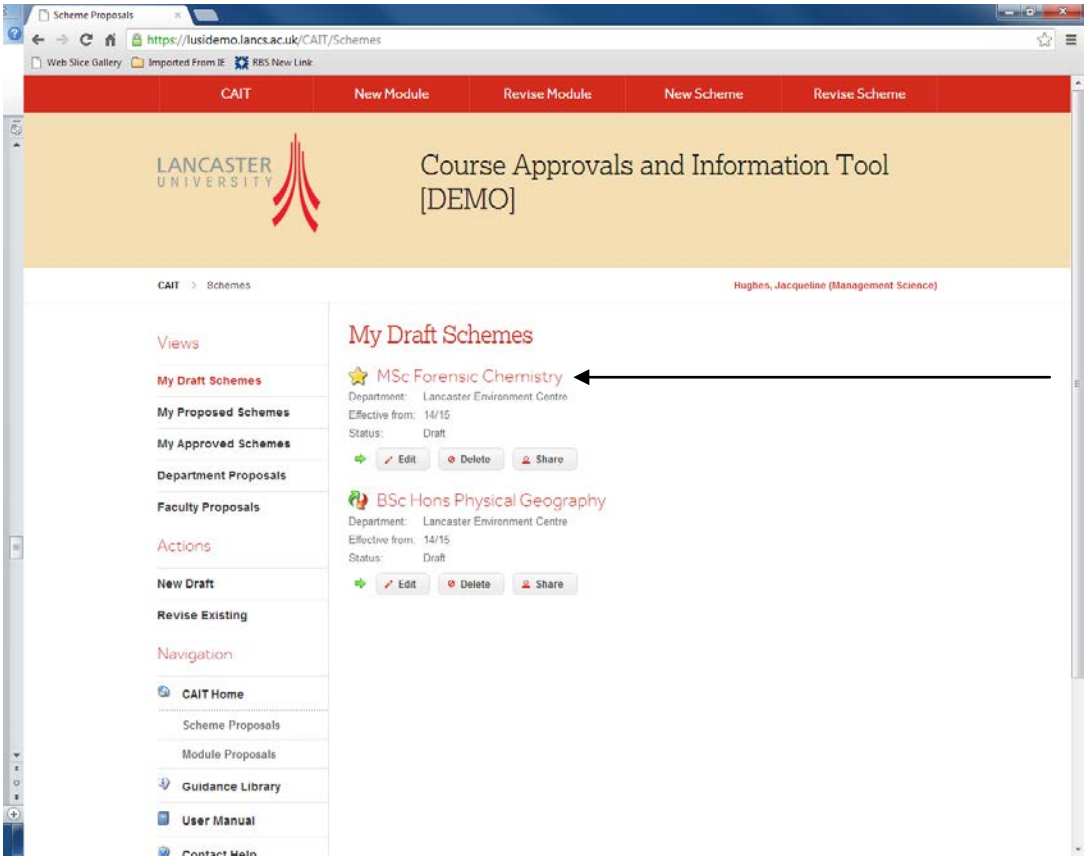
Upon sharing the draft, the other user will be able to edit the draft and will also be copied into any alerts generated by CAIT.

Print or save (to PDF) a draft proposal (or submitted/ approved proposals)

CAIT proposals are available to print or to save as a PDF document.

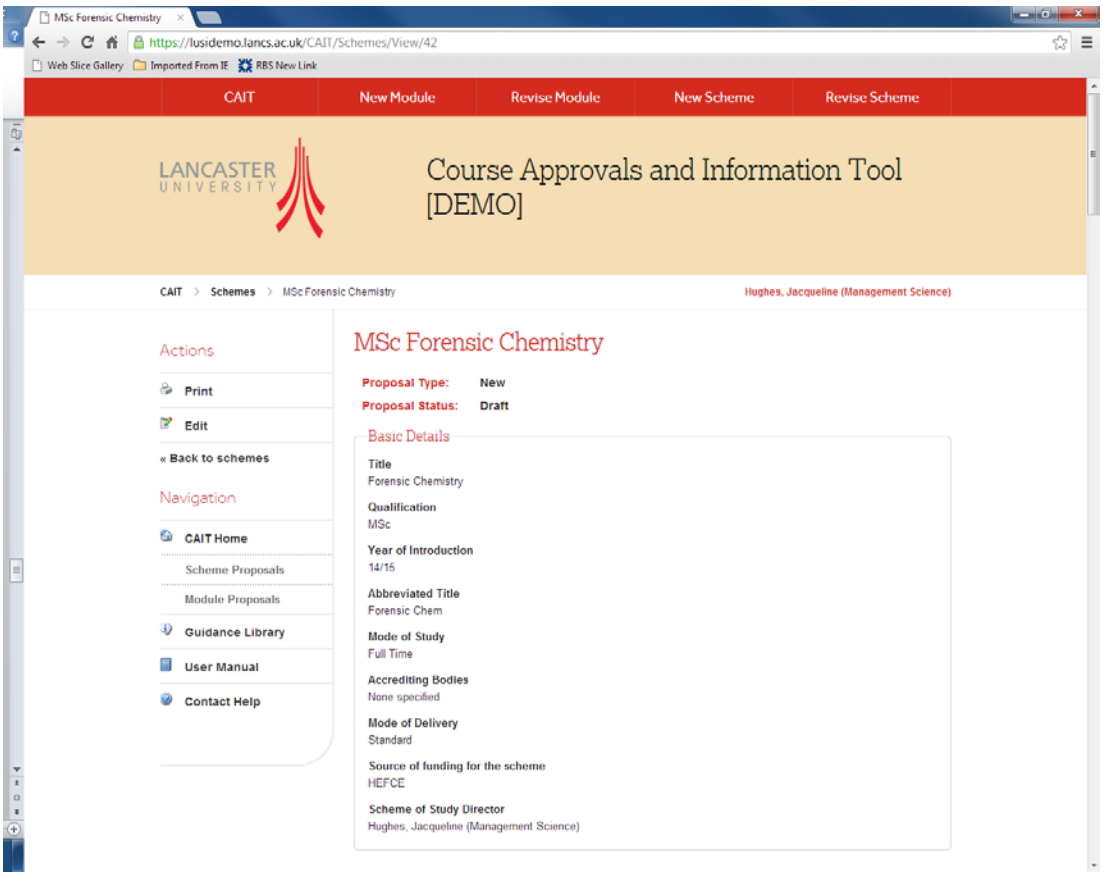
To do this:

- Click on the name of the proposal to be printed/ saved, for example…



Click on the title of the proposal (large red font)

…and you will see a screen where all fields are now displayed in a single form, for example…



In the left hand menu you have the choice either to Edit (if you spot missing/ incorrect data) or to Print. For revisions to existing programmes or modules, you will also have the option to print either Revision Summary (the top four fields where the nature of the proposed change is described) or Details, for the summary fields and the full course record. Choose the Print option and you can then either print the form directly or save as a PDF (or XPS, or Microsoft OneNote) document.

Retrieve a submitted proposal for editing

Within CAIT, it is possible to retrieve a submitted proposal for editing. **However, this step can only be taken by your local Faculty TQSO.**

Should a teaching committee not yet approve a proposal – for example, if revisions are needed before resubmission or Chair's Action to approve – your local Faculty TQSO will release the form 'back to draft' for you to amend as advised.

When the form has been released back to draft, you (and any other users with whom the proposal has been 'shared' – see above) will receive an email alert. That email will tell you which form has been released back to draft and also provides advice input by the Faculty TQSO on required/ recommended changes. Occasionally, the action required might be to delete the proposals, if the faculty teaching committee (or institution) have rejected the proposal without further amendments.

If you need to retrieve a submitted proposal, please contact your Faculty TQSO who can release the form back to draft for you. Again, an email alert will be sent to you when that has been done.

FAQ and Further Information

Accessing CAIT via Internet Explorer 8 (usually Windows XP machines, as more recent versions of Internet Explorer cannot be installed)

Internet Explorer 8 (IE8) is no longer being supported by Microsoft. Therefore, in developing CAIT, ISS have fixed several 'bugs' which have affected test-users' screen view of proposals. We believe that the problems have been resolved as fully as possible.

HOWEVER, we would recommend anyone still using IE8 to consider using an alternative browser (Mozilla Firefox or Google Chrome, for example). Problems may not only affect CAIT in the future – rather, as Microsoft has opted not to maintain IE8, browser issues for other services may also arise over time.

New Course Modules (CMOD) or Schemes of Study (SoS)

Zero-credit/ non-assessed modules must be submitted for approval using CAIT. It is possible to input learning hours, even though you will record Credit Rating as zero on the *Basic Details* page. Simply amend the number of hours which appear in the Total Learning Hours field. Where appropriate, fields may be left blank – for example, if a module is a non-assessed skills workshop, then it may not be appropriate to enter any pre-requisite or forbidden module combinations. Please remember that Faculty TQSO can also provide advice as you complete a proposal in CAIT.

Revised Course Modules (CMOD) or Schemes of Study (SoS)

Revisions to modules or schemes will often require submission to the faculty for formal approval (and occasionally the institution, in the case of major revisions to schemes). However, there are also occasions when this may not be required, or revisions may be presented for information only. In CAIT, the Faculty TQSO play a triage role and will direct submissions as appropriate and agreed within your home faculty. A selection of example major/ minor revisions are available here <insert link>, for guidance, though this is not an exhaustive list and – if in doubt – you must contact your Faculty TQSO.

CAIT also provides users with the opportunity to reformat how course text appears online. For example, when bulleted lists were not available via the old course approvals service, then dashes, asterisks or other punctuation marks may have been used. We encourage users to take the opportunity to tidy up any messy formatting in course data when submitting a revised proposal.

Occasionally – either within one year or over a series of years – multiple revisions to a Scheme of Study may be made. However, it is possible that substantial and/or multiple revisions to a scheme may mean that a new Scheme proposal is more appropriate. If you feel that Scheme proposals from your area might fall into that category, please contact your Faculty TQSO for further advice. If he/ she is at all unsure, then they will take the question forward with the institution via Academic Standards & Quality in the Secretariat.

Course Modules with multiple cohorts

It is now possible to add multiple cohorts to proposed new modules and to amend cohort details for existing modules with multiple entry points per year. Onscreen instructions are provided via the fields relating to *Cohort* on the Learning page within the CAIT form. This functionality has been developed to support those departments which operate cohorts in this way - although other departments may have chosen to set up stand-alone module, with mnemonics that differentiate one from the other. If at all unsure, please contact your Faculty TQSO.

CAIT Alerts to Faculty TQSO and others

Upon submission of any proposal, CAIT issues alerts via email to officers to make them aware of the submission and to request further action. Each submission will issue an alert to your Faculty TQSO, so that they can direct the proposal within the faculty.

In addition, here are some other alerts which will be generated:

- (for a new module) an alert is sent to Registry (timetabling) to request that they review teaching room requirements. If a comment is made by the timetabling manager, that will be recorded within CAIT and added to the proposal form for the attention of the faculty teaching committee. Although many departments will contact Registry as a matter of course, this alert is intended as a way to ensure that Registry do see what is in the pipeline, although it may only be a later stage that further action is necessary to address any problems.
- (for new schemes) an alert is sent to the University's Planning Support Office, so that a check can be made of certain HESA-sensitive data. These include the source of funding for the new scheme and the main QAA subject benchmark group. In addition, Planning Office will complete the JACS funding for the new scheme.
- (for new schemes) an alert is sent to Marketing and External Linkages (publications team) to alert them to the approval of a new scheme. Upon receipt of this – and if that has not already been completed beforehand – the publications team will prepare the scheme record for receipt of applications and publicity material. The team will then liaise with the Department where necessary – for example, on prospectus text (as happens annually for all courses) or to clarify whether/ how postgraduate schemes will be made available for applications.

If you have any questions about alerts generated upon submission, your Faculty TQSO may be able to help or contact cait@lancaster.ac.uk.

How to make suggestions for changes to CAIT and/or Guidance

There is a helpdesk facility for CAIT users. A link to email cait@lancaster.ac.uk is provided on the left hand menu of most pages. Emails will reach the Academic Standards & Quality (ASQ) team in the Secretariat who will either respond to your request for help or direct to others – for example, if the issue is technical or relates to underlying LUSI data.

You are encouraged to comment on the onscreen instructions per field in CAIT and/or on any guidance provided within the Guidance Library. This is so that we can make instructions and guidance as clear as possible. Again, any such comments can be sent to the CAIT helpdesk. Depending on the nature of the comments, ASQ may make amendments to the onscreen instructions directly, or provide further advice to the user.

Amendment Record Sheet

Revision	Date	Section	Description	Author
1.1	14/08/2012	All	Creation of first draft	JH
1.2	01/10/2012	All	Completion of first draft, including screenshots	JH
1.3	17/01/2013	All	Screenshots enlarged	AC